



# INTERNATIONAL EGG AND POULTRY REVIEW

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Poultry Programs

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## EU Avian Influenza Update

On July 11, 2003 all the restrictions imposed after the outbreaks of avian influenza in the Netherlands expired, with the exception of the surveillance zones around the outbreaks. Restrictions in Belgium and parts of Germany had already been lifted in June. Effective July 12 exports of live poultry, hatching eggs and fresh, unprocessed poultry manure and litter can restart. The outbreak of Highly Pathogenic Avian Influenza (HPAI) that started in late February is now considered as over. About 30 million birds had to be killed to control the outbreak.

As a result of the HPAI outbreak, some 80 percent of Dutch turkey farms were depopulated, over 55 percent of the table egg production is gone, and 25 percent of the broiler farms closed. Duck production has been cut in half. EU egg production will be 3-5 percent lower next year. USDA forecast EU broiler exports to be 720 million tons in 2003, 15 percent lower than 2002.

The EU is the world's third largest broiler exporter and the Netherlands accounts for 29 percent of EU broiler exports to the world. In 2001 Saudi Arabia, Russia and China/Hong Kong were the largest markets for EU broilers. Russian First Deputy Agriculture Ministry Sergie Dankvert said the EU decision was premature and Russia retained the right to limit poultry imports from the European Union. Russia had already banned poultry from Belgium and the Netherlands.

In the UK, a third of all chicken imports are from The Netherlands and Belgium, about 150,000 tons of meat annually. Wholesale prices in London on 2.5 to 3.5 pound broilers averaged US\$1.86 the week of July 11, 2003, up 14 percent compared to a year earlier. Skinless breast fillets averaged US\$5.36, an increase of 54 percent over a year ago.

## Netherlands Egg and Egg Products Exports

	2000	2001	2002
*Shell Eggs	17,569	16,806	15,550
Dried Eggs MT	8,315	7,171	8,300
Liquid Eggs MT	52,852	48,969	56,700

\*thousand 30 dz cases

## Poultry Stocks and Production, Netherlands, 2001 and 2002

	2001	2002	Percent Share	
			EU	World
Chickens (1,000 hd)	100,334	98,000	9.7	0.6
Eggs (mt)	658,000	653,000	12.0	1.3

Sources: International Egg Commission, United Nations FAO, European Commission, DEFRA, USDA/Foreign Agricultural Service, various news wires

## Japan: Powdered Egg Imports in metric tons

	Powdered Whole Eggs	Powdered Yolks	Powdered Albumen	Total
2002				
January	253.1	187.4	841.7	1,282.2
February	261.9	191.7	481.0	934.6
March	251.1	244.7	665.7	1,161.5
April	170.2	207.2	883.5	1,260.9
To-Date	936.0	831.0	2,871.9	4,639.2
2003				
January	224.4	235.0	1,020.5	1,479.9
February	145.4	211.4	434.0	790.8
March	229.3	238.5	661.0	1,128.8
April	172.4	121.1	816.9	1,110.4
To-Date	771.5	806.0	2,932.4	4,509.9

Source: ALIC

## European Commission Takes Member States to Court Over Protection of Laying Hens

The European Commission decided to refer Austria, Belgium, Greece and Italy to the European Court of Justice over their apparent failure to implement Directive 1999/74/EC. All EU member states had until January 1, 2003 to implement the 1999 Directive setting out minimum standards for the protection of laying hens. Under the directive non-enriched cages (without perches, nest boxes and litter areas) must provide a minimum of 550 square centimeters per hen; enriched cages must give at least 750 square centimeters per hen; and non-cage systems have to provide at least one nest for every seven hens, along with adequate perches and a stocking density at or below nine birds per square meter of usable area.

Source: EU press release, [www.wattnet.com](http://www.wattnet.com)

## Mexico: TRQ for Ducks, Geese and Guinea Fowl

The Secretariat of Economy (SE) published on July 14, 2003, in the Diario Oficial (Federal Register), a unilateral (from all the world) 2003 TRQ for imported whole ducks, geese, and guinea fowl for 200 MT at a 10 percent duty. This TRQ will be valid until December 31, 2003. The SE will assign the TRQ by direct allocation for 20 MT per company, which can be increased as long as there is a balance.

**Related Trade Issues:** The Secretariat of Agriculture (SAGARPA) through the Animal Health Office requires two Avian influenza test for all poultry products that are imported into Mexico: the agar gel immunodiffusion (AGID) procedure and hemagglutination inhibition test (HI). For the 20 km border areas in Mexico, SAGARPA exempts imported poultry from the HI testing. However, products like ducks and geese have not been able to comply with the HI test to be imported into Mexico beyond the 20 km border area. It seems that Canadian product is complying with AI requirements.

Source: USDA/Foreign Agricultural Service

**Inspected Egg Products-U.S. & Canada Export/Import Trade****U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending July 12, 2003	2003	2002/1	2003	2002
Liquid	198	249	8,824	10,373
Frozen	93	0	96	21
Dried	0	0	271	328
Total	291	249	9,191	10,722

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

Week Ending July 12, 2003	2003	2002/1	2003	2002
Liquid	112	73	3,160	3,659
Frozen	46	83	1,730	1,966
Dried	0	40	841	2,987
Total	158	196	5,731	8,612

**Inspected Shell Eggs****U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending July 12, 2003	2003	2002 /1	2003	2002
Jumbo	0	0	256	1,161
Extra Large	950	1,877	12,807	13,842
Large	3,410	5,129	53,775	72,574
Medium	1,770	1,674	35,748	28,266
Ungraded	3,600	0	44,226	172,235
Misc	0	98	3,852	12,282
Total	9,730	8,778	150,664	300,360

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

**LIVE POULTRY SLTRD UNDER INSPECTION** W/E 12-Jul-03

(PRELIMINARY)

**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,153	1,515	2,668
LAST WEEK	1,019	1,179	2,198
SAME WEEK YR AGO	1,498	1,418	2,916
TO-DATE/2003	45,040	38,006	83,046
TO-DATE/2002	49,710	37,388	87,098

**U.S. FOWL SLAUGHTERED IN CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	326	0	326
LAST WEEK	219	0	219
SAME WEEK YR AGO	253	27	280
TO-DATE/2003	7,068	100	7,168
TO-DATE/2002	8,944	69	9,013

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

**TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,479	1,515	2,994
LAST WEEK	1,238	1,179	2,417
SAME WEEK YR AGO	1,751	1,445	3,196
TO-DATE/2003	52,108	38,106	90,214
TO-DATE/2002	58,654	37,457	96,111

SOURCE: USDA/AMS PLTRY PROGRAMS, MARKET NEWS BR.

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

18-JUL-2003				
<u>CHICKEN</u>				
—— PRICES ——— VOLUME ——				
(Cents per Pound)				
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

<u>CHICKEN, WITH SKIN AND BONES</u>				
	PRICES		VOLUME	
	(Cents per Pound)			
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	11.50	12,000	-
WTD AVERAGE		11.50		
15-20%				
RANGE	15.00-17.00	10.50-14.50	2,339,600	963,200
WTD AVERAGE	16.81	10.18		
20% OR MORE				
RANGE	-	10.50	30,000	-
WTD AVERAGE		10.50		

\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

18-JUL-2003				
<u>CHICKEN</u>				
—— PRICES ——— VOLUME ——				
(Cents per Pound)				
FAT				
CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

**CHICKEN, WITH SKIN ADDED**

PRICES					VOLUME	
(Cents per Pound)						
FAT	FROZEN		FRESH	TOTAL	EXPORT	
CONTENT						
15% OR LESS						
RANGE	15.25-18.50		17.00	502,000	472,000	
WTD AVERAGE	17.04		17.00			
15-20%						
RANGE	16.50	11.00-16.00		1,624,000	504,000	
WTD AVERAGE	16.50	12.54				
20% OR MORE						
RANGE	-	11.00		80,000	-	
WTD AVERAGE		11.00				

\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 18 JULY 2003.**

With the exception of necks, supplies of tom parts were in good shape and the market tone was at least steady. Fresh breast meat was steady and current demand kept supplies balanced. Frozen breast meat was available but buyers showed no interest. Fresh breast pieces moved at 76, fresh scapula at 48 and fresh wing meat at 36 cents delivered. Nonbasted institutional sized breast: A grade 10-18 lb 85 cents; plant grade 12-14 lb 80-85, 12-16 lb 75 and 16-18 lb 73 cents. Export trading was light. Fresh thigh meat moved at 47 cents delivered.

**FRIDAY, JULY 18, 2003**
**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	25.50-26.00		25.70	100	24.54	900
WINGS FULL-CUT - TOMS	17.00		17.00	104	17.44	468
WINGS, V-TYPE, TOM		T	23.05	520	23.05	520
TAILS		F	21.00	40		
MECHANICALLY SEPARATED 2/	17.50		17.50	20	14.56	124
THIGH MEAT - FROZEN	51.00-52.50		51.70	200	51.89	424

**THURSDAY, JULY 17, 2003**
**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	25.00-26.00		25.34	472
WINGS FULL-CUT - TOMS		W	17.57	364
WINGS, V-TYPE, TOM		T	23.05	520
TAILS		F	21.00	40
MECHANICALLY SEPARATED 2/	14.00		14.00	104
THIGH MEAT - FROZEN		W	52.08	144

**WEDNESDAY, JULY 16, 2003**
**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	23.00-26.00		24.83	120
WINGS FULL-CUT - TOMS	17.50-18.00		17.57	364
WINGS, V-TYPE, TOM		T	23.05	520
TAILS		F	21.00	40
MECHANICALLY SEPARATED 2/		F	17.85	1,408
THIGH MEAT - FROZEN	51.00-52.50		52.08	144

**TUESDAY, JULY 15, 2003**
**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	22.00		22.00	208
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	20.75-24.50		23.05	520
TAILS		F	21.00	40
MECHANICALLY SEPARATED 2/		F	17.85	1,408
THIGH MEAT - FROZEN	54.00		54.00	40

**MONDAY, JULY 14, 2003**
**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		F	26.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		R	25.00	208
TAILS		F	21.00	40
MECHANICALLY SEPARATED 2/		F	17.85	1,408
THIGH MEAT - FROZEN	50.00		50.50	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.